

## Akron Chapter IMA Newsletter

The Summit Report

February 2017

**Dear Members:**

**Please join your fellow IMA Members for Young Professionals' Night on February 15, 2017 at the HILTON GARDEN INN, 1307 E. MARKET ST., AKRON, OH 44305**

**Check In is at 5:30 p.m.**

**DINNER IS BEFORE THE PRE-TECH AT 5:45 pm.**

**Pre Technical Session: 6:10**

**Technical Session: 7:10**

**Cost for Members is \$25.00. Non-members pay \$30.00.**

**For every Pre-Technical or Technical Session that you attend, you earn 1 CPE towards your CMA or CPA requirements.**

**Remember, members are always welcome at meetings. Even if you're on a diet or don't feel like eating - come to hear the speakers anyway.... there is NO charge if you are not eating!**

**Please forward newsletter items to: [IMA Newsletter](#). Thanks!**

**Kelly Heil**



Fellow IMA Members,

How are your New Year's resolutions coming along? I'm still working on one of mine by going to the CMA preparation course at KSU. Hope all yours are going well also.

If you haven't made other Valentine's Day plans, bring your sweetie to our February 15th Young Professionals' Night dinner meeting at the Hilton Garden Inn! The topic is good for both young and the more seasoned professionals with "Interview and Resume

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*President's Message*

Tips and the Importance of Networking", presented by Joe Betro and Dolores Prude from Robert Half/Accountemps. This is a skill we need to keep sharp our whole careers and you can never do too much networking. Anyone looking for a position or a change, be sure to bring some business cards to give to Joe and Dolores, along with resumes.

Following this session, we will hear from James Mundell, Owner, Mundell Group Investment Advisors on "The Importance of a Team Planning Approach".

Then if your Valentine is a cheap date, bring him/her to our next IMA Akron Chapter Wine Tasting at the Portage Crossings Giant Eagle in Cuyahoga Falls on February 17th at 6 pm. Then after the fun, and so you don't get in trouble for spending only \$5 a person, pick up a few more bottles for later. □

If you like a more academic event, we have upcoming the "So You Think You're Smarter than a CMA/CPA?", joint IMA/OSCPA event on March 16, from 7 to 9 pm at Kent State University. This event will most likely qualify for CPE and will occur no matter what the attendance. Let's get a good mix of professionals and students at this event. It is sure to be a lot of fun! I will update you more on this event as I find out.

Be sure to check out the upcoming Meonske Conference information below for this April 26 thru 28. The event gets bigger and bigger each year. Now they have added an extra day! Note this is a good way to get your Ethics requirements in for CPE too!

More news later, but we expect to be seeing Mr. Excel in October. Mark your calendars for October 27. More details to follow as the date nears.

[As always, follow us on Twitter for announcements and information @AkronChapterIMA.](#)

**Linda Garrison**  
**President**  
**Akron Chapter IMA**  
**2016/2017**

### ***Pre-Tech Session - "Interview and Resume Tips and the Importance of Networking"***

**Hilton Garden Inn**  
**November 16, 2016**  
6:10 P.M. (SHARP)

#### **Joe Betro and Dolores Prude**

Vice President/Division Director, Permanent Placement Services, Robert Half International and Staffing Executive, Accountemps Salaried Professional Service

#### **"Interview and Resume Tips and the Importance of Networking"**

Joe Betro has been assigned to the Permanent Placement Division, Regional Offices, of Robert Half International for the past ten years. Robert Half, with more than 400 locations and over 60 years of experience, is the world's first and largest specialized staffing services firm, placing quality candidates at all levels on a temporary, temporary-to-hire, and full-time basis. Prior to Robert Half, Joe worked for a Private Equity Firm for several years, primarily in New York. Prior to that, he was a Controller and General Manager for various manufacturing companies in northeast Ohio. Joe began his career as a Cost Accountant with Perkins Diesel Engines in Canton, Ohio.

Joe received a Bachelor's degree in Accounting & Business Administration from the University of Akron, and an MBA from Ashland University. For the past 24 years, he

has lived in Hudson, Ohio. For many years, Robert Half has been the prime sponsor of the Meonske Professional Development Conference every April at Kent State University and Joe has been its onsite representative.

Dolores Prude has been with Accountemps for over 18 years - as a Staffing Manager, Division Director, and in her current role as Staffing Executive for the Salaried Professional Service program. Accountemps, a division of Robert Half International, is the world's first and largest specialized temporary staffing company for accounting and finance professionals. Salaried Professional Service provides coverage for long-term and recurring projects, particularly when continuity is imperative. By leveraging the experience of Salaried Professionals, your organization can more efficiently achieve short and long-term business objectives.

Prior to her career with Robert Half, Dolores worked for the Gallup Organization as a researcher in the Business and Government Division. She received her BS in Business Administration from Cardinal Stritch College in Milwaukee WI. Dolores resides in Jackson Township OH.

### ***Technical Session - "The Importance of a Team Planning Approach"***

**Hilton Garden Inn**

**February 15, 2017**

Young Professionals' Night

**James F Mundell**

Owner, Mundell Group Investment Advisors

#### **"The Importance of a Team Planning Approach"**

Jim grew up in Uhrichsville OH and attended Claymont High School. After high school, he joined the US Army where he served for four years. He served in Fulda, Germany, on border patrol during the reunification of East & West Germany. Shortly thereafter, he served in Operation Desert Storm and Saudi Arabia. While in the military, he earned the Good Conduct Medal, Army Achievement Medal, NCO Professional Development Ribbon, Southwest Asia Service Medal, Overseas and National Defense Service Medals, and his Military Combat Patch. While serving his country, Jim began his college education through the Army Education Centers where he was stationed.

Upon leaving the military, Jim attended Walsh University, studying business with a major in Management. He completed his Life, Health, and Annuity Licensing requirements. He then completed his securities training and licensing to become a licensed stock broker. In 2009, Jim converted his broker's license to a fee-based planner as an Investment Advisor under the firm he established, "Mundell Asset Management LLC" for "risk" money. Today, he continues to run The Mundell Agency, which handles "safe" money.

Jim started his career with Prudential Insurance and learned all aspects of the life insurance industry. He then worked with Financial Horizons and, later, Banc One Securities as a financial advisor.

Jim has been advising seniors in the areas of Medicaid and Probate Concerns, as well as Retirement and Estate Planning for 23 years. He continues to give seniors "safe" alternatives to their retirement planning needs. He coined the term "4 Pillars of the US Economy" (Banks, Insurance Companies, Wall Street, and the US Government), and has authored news articles for papers such as the Senior Forum. He has spoken at more than 300 public venues, and continues to speak out on his series "Common Mistakes Retirees Make". He hosts a radio show (on the air for 8 years) on WNIR 100.1 FM every Saturday from 2 to 3 PM, called "Retirement Strategies".

Jim lives in Canal Fulton OH with his wife, Joanne, who works with him to serve his clients; his daughter, Jordan, also helps out. Jim maintains clients in many states

throughout the US and continues to be one of the most sought-after advisors in his field.

## ***2016/2017 Meeting Schedule***

Regular meetings for 2016/2017 will be:

February 15, 2017 - "Young Professionals Night"

March 15, 2017 - "CMA./CFM Night"

April 19, 2017 - "Past Presidents' Night"

May 17, 2017 "Guest Night"

All monthly meetings will be held at the Hilton Garden Inn unless otherwise indicated above.

For meetings at Hilton Garden Inn check-in at 5:30 p.m., dinner at 5:45 p.m., pretech 6:10 p.m., and tech session at 7:10 p.m.

## ***CMA Review Course at Kent State***

I wanted to let everyone know that we are going to be having an informal CMA Review course for Part 2 here at Kent State during the spring semester 2017. Here are the details:

- 1) We are going to be basing the review course on the Wiley CMAexcel Review Course, so you would need to purchase the review course (to get the participant guide.) The link to Wiley's site is <https://www.efficientlearning.com/cma/>
- 2) The review course sessions will be held Sunday afternoons usually from 3 - 6 pm in the College of Business at Kent State.
- 3) The first review session will be on Sunday, January 22, 2017.
- 4) The review course will consist of 13 sessions; we will finish up in early May. There will be a few Sundays off due to exams, spring break, etc. A detailed course schedule will be available in early January.
- 5) I am leading the overall course. Students will rotate "teaching" the review sessions week by week; the best way to learn anything is to teach it. However, I will be involved in every review session.
- 6) There is no cost for the course (beyond the cost of purchasing the Wiley CMAexcel Review materials). However, a small donation of \$50 for our student IMA chapter would be appreciated if you participate.
- 7) If you want to sign up for the Part 2 CMA review, just email me at [wtietz@kent.edu](mailto:wtietz@kent.edu). We would love to have you; feel free to share this information with interested colleagues.
- 8) If you have any questions, please let me know.

## ***Wine Tasting***



Our IMA group is meeting for another of its popular wine tastings at the Portage Crossings Giant Eagle in Cuyahoga Falls on February 17th. The wine tasting starts at 6:00 pm, and costs just \$5. This buys you three tastes of wine paired with 3 samples of food (including dessert!) We meet in the retail wine area, near the in-store bar, around 6:00. We then adjourn upstairs for live music and possible further food and drink. You don't have to let us know if you are coming, but if you know you are attending, we will know to look for you. Please e-mail [andrea@state8.com](mailto:andrea@state8.com) if interested.

### *Welcome New Members*

Please welcome the following new members to the IMA Akron Chapter:

| Date Joined | Name                     | Employer                | Sponsor     |
|-------------|--------------------------|-------------------------|-------------|
| 1-3-17      | Chandra Bahadur Ghalley  | Ghalley & Co., CPA, LLC | -           |
| 1-13-17     | Paul E. O'Brien          | MacTac North America    | -           |
| 1-14-17     | Diante O'Neal Bartlett I | Student, KSU            | Wendy Tietz |

### *Message from the Employment Directors*

Please contact [Bob Shapiro](#) if you have a job available or are looking for an employment opportunity.

### *Annual Program Book Update*

The Board of Directors has decided to stay with the pdf online format of the Annual Program Book and, thus, hard-copy Annual Program Books will not be mailed to members with email addresses. Instead, members can view/download the book from the website address [www.yodergraphics.com/ima/2016\\_ima\\_roster.pdf](http://www.yodergraphics.com/ima/2016_ima_roster.pdf). The password is "ima2016". The website was accessible after October 1. Members without an email address will still be mailed a hard-copy Program Book. Members who attended the September 21 tech session meeting at the Hilton Garden Inn also received a Program Book. If you need a hard-copy of the Annual Program Book, please contact Linda Garrison at [Linda\\_Garrison@goodyear.com](mailto:Linda_Garrison@goodyear.com).

### *Internet Reference Page*

Dinner Reservations: [imadinner@hotmail.com](mailto:imadinner@hotmail.com) or 330-904-7986

Newsletter articles: [ima\\_newsletter@yahoo.com](mailto:ima_newsletter@yahoo.com)

Employment service: [rshapiro@socius1.com](mailto:rshapiro@socius1.com) or 330-703-9195

IMA insurance: R\_Showarter@hotmail.com or 330-688-7670

Akron chapter website: [www.akron.imanet.org](http://www.akron.imanet.org)

IMA National website: [www.imanet.org](http://www.imanet.org)

Login : enter user name (your IMA account number)

Enter password (last name, unless you changed your password)

Ohio Council website: [www.ohio.imanet.org](http://www.ohio.imanet.org)

Online Program Book: [www.yodergraphics.com/ima/2016\\_ima\\_roster.pdf](http://www.yodergraphics.com/ima/2016_ima_roster.pdf)

Password is ima2016

Access online recording of chapter meetings:

To register, contact Roy Howarter at 330-688-7670 or R\_Showarter@hotmail.com

Get the password from Roy

### ***Come to a Board Meeting***

If you would like to go behind the scenes and learn what it takes to put on monthly tech session meetings and run the chapter, why not attend a Board meeting? The next meeting will be on February 22 at 6:15 PM at the Enclave, 3800 Rosemont Blvd., Fairlawn 44333. Come in off Cleveland-Massillon Road to Rosemont Blvd. Go west on Rosemont Blvd. all the way to the end (one exit beyond the entrance to Rosemont Country Club). Turn right at the last right before the gates blocking entrance to Rothrock Road; clubhouse is the first building on the right. Free pizza and soft drinks; see your Board leaders in action.

### ***A New CMA In Town***

Congratulations to Jake Jarrell of Goodyear Tire & Rubber Co., who earned his CMA certificate on 12-12-16.

### ***December 9 PD Seminar Recap 2***

I saw that I was credited with the December 9th PD seminar and although I did get the speakers and do much of the background work, no one ever does any of our projects or seminars alone. I just wanted to make sure that my fellow directors are recognized for their very important contributions to making it happen. Thanks to Andrea Schnee for making all the arrangements with Rosemont for the room and food, Steve Law for getting the speaker gifts, Jeff Falter for sending out notices to our membership about the seminar and Linda Garrison for carrying the word to our members and getting the flyers to each meeting. Linda also helped to run the seminar on the 9th. Okay, now I feel like I am giving an acceptance speech at the Golden Globes, but I think it is important to thank those people who make a difference. Our directors sure do!!!!!! Thank you.

Diane Saulino, CGA

### ***Meonske Professional Development Conference***

#### **Save the Dates**

43rd Annual Professional Development Conference

Institute of Management Accountants, Ohio Council at Kent State University

**WEDNESDAY, April 26, 2017 PRECONFERENCE WORKSHOP (8 HOURS CPE)**

Speakers are Ashwinpaul (Tony) C. Sondhi and Gabe Zubizarreta

"Transformation Panel: Selected Executing Challenges & Practical Solutions"

"Panel: Revenue Recognition - ASC 606 Implementation Challenges Already Experienced"

"Panel: Finance Business Partnering - Making Successful Partnerships"

#### AFTERNOON CONCURRENT TECHNOLOGY TRACKS

#1 "Panel: Revenue Recognition Technologies: Determining the Need & Selection Criteria"

"Panel: Revenue Recognition Technologies: Successful Implementation Considerations" OR

#2 "Panel: Leasing Technologies: Successful Implementation Considerations"

"Panel: Leasing Technologies: Determining the Need & Selection Criteria"

#### **THURSDAY, April 27, 2017 CONFERENCE (8 HOURS CPE)**

"How the CMA and Related Learning Enhances Personal Brand & Professional Reputation"

Jeffrey C. Thomson, President & CEO of the IMA

"The Millennials Are Coming - How to Get Them Integrated, Engaged & Effective in the Workplace"

Timothy F. Gearty, Partner, Gearty & McIntyre, LLP, National Director & Editor-in-Chief, Becker Professional Review

"Non-GAAP Financial Measures that Add Transparency & Value to Financial Reporting"

Timothy F. Gearty

"The Truth & Consequences of Accounting Ethics: Considerations in Ethical Decisions & Workplace Dilemmas"

Timothy F. Gearty

Donald C. Brown, Executive VP for Finance & Administration, FedEx Freight

"The Next Frontier: What Management Accountants Need to Know about Sustainability Accounting"

Dr. Jean Rogers, CEO & Founder, SASB

"Meaningful Reporting on the Metrics of Sustainability through Current SEC Requirements"

Robert B. Hirth, Jr., Chair, COSO, Senior Managing Director, Protiviti, and Member, SASB

#### AFTERNOON CONCURRENT TRACKS

#1 "Empowering Financial Transformation Success"

Gabe Zubizaretta, Founding Principal, Silicon Valley Accountants  
 Jeffrey L. Bissell, CFO & Treasurer, NMG Aerospace  
 OR

## #2 "Ohio Professional Standards and Responsibilities

Dr. Norman R. Meonske, Professor Emeritus, Kent State University

### **FRIDAY, April 28, 2017 CONFERENCE (8 HOURS CPE)**

#### "Financial Reporting Panel: Accounting Standards Update"

Leslie F. Seidman, Executive Director of the Center for Excellence in Financial Reporting, Lubin School of Business, Pace University  
 Wesley R. Bricker, Chief Accountant, SEC  
 Jeannete M. Franzel, Board Member, PCAOB  
 James L. Kroeker, Vice Chairman, FASB  
 Robert Uhl, Partner, National Director of Accounting Standards & Communication, Deloitte & Touche LLP

#### Luncheon Speaker (Topic TBA)

Joseph M. Gingo, Chairman, CEO and President, A. Schulman Company

#### "A New Era of Compliance and Latest COSO Internal Control - How Companies are Complying"

Jeffrey C. Thomson, President & CEO of the IMA  
 Dr. Sandra B. Richtermeyer, Dean of the Manning School of Business, UMass - Lowell  
 Robert B. Hirth, Jr., Chair, COSO

#### "Empowering a Diverse Workforce to a Position of Leadership"

Bismark Myrick, Director of the Office of Equal Employment Opportunity & Diversity, US Patent & Trademark Office  
 Billy O'Quinn, Director, Global Diversity & Inclusion, The Goodyear Tire & Rubber Company  
 Carlos M. Chavez, Chavez & Associates

### ***CMA Mentoring Program***

The Akron chapter IMA is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The Akron IMA CMA Mentoring Program will encourage networking and provide career development opportunities designed to help CMA candidates (mentees) and other members (mentors) in our chapter to form valuable mentoring relationships. The success of this program will rely on volunteers to serve as mentors. Mentoring can take place online, by phone, or in person at Akron chapter events or other locations.

The CMA Designation The CMA (Certified Management Accountant) is the advanced professional certification specifically designated to measure the accounting and financial management skills that drive business performance. Achieving the CMA credential demonstrates your mastery of financial planning, analysis, control, and decision support, as well as professional ethics.

The CMA credential is: Focused - On the critical skills you use in business Respected - Leading employers seek to hire and promote CMAs Valued - CMAs on average, earn

higher compensation than noncertified professionals Convenient - CMA exams are offered electronically in hundreds of locations worldwide

The CMA Mentoring Program The accreditation process leading to the CMA designation can be a rigorous experience requiring great energy and effort. The CMA candidate will have questions regarding exam content, study materials, test taking strategies, and much more. Without somebody to guide and mentor them, the candidate may become discouraged and abandon the certification program. However, through the Akron IMA CMA Mentoring Program, candidates will be able to seek and obtain the support and guidance of fellow chapter members who have earned their CMA designation.

Mentees and mentors will be matched based on the needs of the mentee and the availability of the mentors. The ideal mentor for this CMA focused program would be an individual who has obtained the CMA certification and / or who has recently passed one or both parts of the newer two part CMA exam structure. All individuals who are currently enrolled in the CMA program and studying for the CMA exam are encouraged to enroll as a mentee. In addition, individuals who are undecided about obtaining the CMA certification and would like additional information or guidance are encouraged to enroll.

If you would like more information, please contact: Jeff Falter [jfalter@roadrunner.com](mailto:jfalter@roadrunner.com)

### Quick Links...

- [Change of Address](#)
- [Update your IMA Profile](#)

email: [imadinner@hotmail.com](mailto:imadinner@hotmail.com)

web: <http://akron.imanet.org>

Akron Chapter IMA, Rockside Road, Cleveland, OH 44131

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